ONTARIO ENERGY BOARD

ENBRIDGE GAS INC.
FIVE YEAR GAS SUPPLY PLAN

INTERROGATORIES OF
CANADIAN MANUFACTURERS & EXPORTERS ("CME")
TO ENBRIDGE GAS INC. ("EGI")

2-CME-1

Ref: EB-2025—0065 Enbridge Gas 5-Year Gas Supply Plan, p. 17

At page 17, EGI stated that "The final number of general service customers forecast is derived by adjusting the base forecast with an energy transition (ET) adjustment, which considers potential loss of customers over time (egress of the natural gas system)."

(a) How does EGI apply an energy transition adjustment with respect to industrial, general service customers? If there are differences between the ET adjustment as between various sectors of general service customers, please show the differences and explain why those differences are justified.

(b) If the same ET adjustment is applied regardless of general service sector, please explain why EGI believes there is no difference in the energy transition impact as between sectors.

2-CME-2

Ref: EB-2025—0065 Enbridge Gas 5-Year Gas Supply Plan, p. 17

At page 17, EGI stated that natural gas prices were considered, but ultimately excluded from the final forecast, as they were not found to be statistically significant. Later in the paragraph, EGI stated that real natural gas prices was a major demand driver.

(a) How does EGI calculate real natural gas prices? Is it simply the commodity price adjusted for inflation?

(b) Depending on your answer to a) above, in a higher inflation environment where real prices stayed constant, but nominal prices outpaced wage growth, where nominal prices may become a more statistically significant factor?

2-CME-3

Ref: EB-2025—0065 Enbridge Gas 5-Year Gas Supply Plan, p. 19

EGI stated that general service market demand is forecast to decline by approximately .5% over the plan period, driven by declining average use, energy transition impacts, and DSM consumption savings.

(a) Please break out the total decline amongst the factors listed above.

(b) With respect to declining average use, is this factor the decline in average use separate from the other two factors (in other words, not including any decline in average use caused by the energy transition or DSM savings?) If so, please explain what factors are impacting declining average use apart from the energy transition and DSM savings.

1-CME-4

Ref: EB-2025—0065 Enbridge Gas 5-Year Gas Supply Plan, p. 64

At page 64, EGI discussed its response to tariff threats from the United States and potential retaliatory tariffs from Canada.

(a) Please confirm whether, besides a heightened awareness of potential issues in the future, whether the imposition of US tariffs and the potential of matching Canadian tariffs caused EGI to make any different decisions with respect to any actual supply options in the gas supply plan. If yes please describe the changes. If not, please explain why not.

(b) Similar to a) above, did the imposition of tariffs or the potential for reciprocal tariffs impact EGI's evaluation of any supply options even if ultimately EGI still decided to move ahead with those options. For instance, did any source of supply get a lower rating for security of supply as a result of being potentially subject to tariffs? If yes, please advise which ones. If not, please explain why not.

2-CME-5

Ref: EB-2025—0065 Enbridge Gas 5-Year Gas Supply Plan, Appendix A, p. 10 of 14

At page 10, EGI stated that "Currently, Enbridge Gas continues to experience strong demands from its customer base in Ontario, particularly during cold winter conditions like those experienced during the winter of 2024/25.

However, in response to an interrogatory in EB-2025-0064 (CME-12) EGI stated that the winter of 2024/2025 was warmer than forecast.

(a) Please confirm that EGI experienced lower demand that forecast during the winter of 2024/2025. If not confirmed, please explain why.

(b) Please confirm what impact, if any, less demand than forecast would have on EGI's gas supply planning and analysis, if any.